

All That Paper Stuff and More

The man who removes a mountain begins by carrying away small stones. Chinese Proverb

Like it or not, there is a certain amount of paperwork that must be done to effectively support a volunteer program. Today we are fortunate to have increasingly more sophisticated computer systems and specialized software to support volunteer programs. You may decide this is worth the purchase or you may want to use the skills of a computer-savvy volunteer to help set up a system for your organization. Whichever way you go, the following suggestions are offered for your consideration when setting up a record-keeping system.

Build a Resource File or Database

This may seem like an obvious suggestion in our current technology age, but you would be surprised how many volunteer programs still operate “out of a shoebox.” As mentioned in chapter five, keeping a database of contacts, current volunteers, and prospective volunteers on some sort of database is crucial to running a smooth volunteer program. If set up correctly, a database can offer many benefits:

- A way to identify current contacts and their connection to your organization
- A tracking system for recognition and other information about the volunteers now serving your organization
- Assistance in selecting suppliers and resources needed for your program
- Recruitment information to target new groups

- A safety net for risk management
- Financial information for audits and day-to-day functioning
- Date collected on surveys and assessments
- Data about attendance at events
- Contacts needed for event planning
- List of past sponsors and prospective sponsors with contact information

A good suggestion is to meet as a volunteer committee, board, or staff/volunteer steering committee every year to review some of these files and update new contacts, brainstorm for additional resources, and generally review the finances. If your organization cannot afford a computer, there are many larger nonprofits who give their old computers away when they update and like to see them go to other nonprofits in need. Check with your state nonprofit association for those opportunities. Be sure and keep files on each volunteer with anecdotal information and any forms you have filled out on that volunteer for reference.

Creating a Web site

Volunteering has moved into cyberspace and volunteers are now finding the organization with which they want to volunteer over the internet. Be prepared for this by joining with others and creating a web site where people can learn about your organization and how it contributes to the community. Collaborating with other nonprofits or community organizations can greatly decrease the costs of this venture if cost is an issue. This site can also offer other benefits such as advertising upcoming events, programs and introducing your board, staff and volunteers to the world. Web site training can be relatively inexpensive as community colleges and adult learning centers now offer classes on how to set up and maintain web sites.

Internal Accounting

If your volunteer program is run separately from the organization's main accounting system or if you are like many arts and cultural nonprofits and have a volunteer treasurer who does all the accounting for the organization, setting up a good financial internal control system is advisable both from a fiscally responsible viewpoint and from a risk management perspective.

Internal control refers to a system of financial checks and balances designed to protect your organization. The system assures that the money is being spent the way the board wants it to be spent. It also helps to assure that money does not disappear or that mistakes do not occur.

Since many of you reading this handbook are from organizations that will have “cash” as their only asset (no buildings, equipment, bank loans, etc.), internal control procedures are developed primarily for cash receipts and cash disbursements.

Cash Receipts: (Income)

Cash should be deposited in the bank as soon as possible after receipt. It is best if only one person, preferably the treasurer handle all the results. If you have someone who takes money at a ticket window, for example, have that person turn over the money to the treasurer for deposit. The treasurer should count the money and give the other person a receipt or sign some kind of accounting form that the money was received by the treasurer. If someone runs a major fundraising event, then that person should keep a thorough accounting of where the money came from to give to the treasurer when turning the money in. If the treasurer cannot make the deposit or if it is more feasible for the event manager to do it, then a careful accounting of the deposit should be made.

Cash Disbursements: (Expenses)

Even if someone needs reimbursement for their expenses, a paper with signatures should be on file.

Bills that come in should be approved for payment by the person who knows what the expense was for. For internal control purposes, it is best if this is not the treasurer. The authority to approve may be restricted by the president or committee chairs. The by-laws should have directions as to who should approve expenditures and invoices. If a third person approves the invoices, then the check and balance system is in effect. The treasurer should be sure that any time she/he receives a bill to be paid, approval is indicated by a signature or initials and a date. As invoices are paid, the check number and date should be written on the invoice and it should be filed in check number order. The rule to follow is: set up a payment system that prevents an invoice from being paid twice and a filing system that allows a paid invoice to be found easily.

Bank Reconciliation:

All bank accounts must be reconciled each month. The best internal control would be to have the bank mail the monthly bank statement to someone who is not a check signer and then she/he obtain the checkbook and reconcile the account “independently” of the treasurer. This may not be practical, in which case the treasurer would be the one to reconcile the account each month.

Bonding:

Unfortunately, treasurers and other members of nonprofit organizations have been known to misuse funds. This can be embarrassing and expensive for the organization. Some groups purchase an insurance policy to protect themselves against misuse of funds called “fidelity bonds,” or “bonding.” It is usually quite inexpensive and is something your board of directors should consider.

Orientation Packet

Another aspect of paperwork that you will want to consider is putting together an orientation packet (volunteer handbook) for new volunteers. This packet can be given to the volunteer before beginning to work with the organization or at a special orientation meeting. Some things you may want to consider including in the orientation packet or handbook include:

- A welcoming statement and a written copy of the organization’s volunteer philosophy
- A brief overview of the organization including a list of board and staff members and the areas they are in charge of (organization flow charts are helpful), a copy of the mission statement, annual reports, some of the projects being worked on, and any positive media coverage. I have found that pictures of key people are very helpful when entering an organization.
- Rewards and benefits of volunteering with your organization
- Requirements and procedures for volunteers including training needed, emergency procedures, resignation (if needed), grounds for dismissal (yes, you can fire a volunteer), appeal process, etc.
- Statement of professional standards and ethics for volunteers (see below for sample ethics statement)
- Annual calendar of events, volunteer activities, training sessions, fundraising events, etc.
- Sample evaluation/assessment forms
- History of the volunteer organization including a brief description of the volunteer programs, current officers, etc.
- Details about any volunteer benefits or programs such as a mentoring program and how it works. An organizational chart about the current volunteer committees and their purpose would also be helpful for the overall picture of where the volunteer fits in.

- A job description specific to the volunteer's new assignment with clear details about their role and who they should report to, where they go for resources and any deadlines they need to be aware of.
- A clear, detailed process for communication, feedback and assessment outlined for the volunteer

The orientation packet/volunteer handbook should not be a substitute for a personal orientation tour of the organization's physical space with instructions as to where to find supplies, who is in charge, and other pertinent information.

A Code of Ethics for Volunteers

As a volunteer I realize that I am subject to a code of ethics similar to that which binds the professional in the field in which I work. Like them, I assume certain responsibilities and expect to account for what I do in terms of what I am expected to do.

1. I will keep confidential matters confidential.
2. I interpret "volunteer" to mean that I have agreed to work without compensation in money, but having been accepted as a worker, I expect to do my work according to standards, as the paid staff expect to do their work.
3. I promise to give to my work an attitude of open-mindedness; to be willing to be trained for it; to bring to it interest and attention.
4. I realize that I may have assets that my coworkers may not have and that I shall use these to enrich the project on which we are working together.
5. I realize that I may lack assets that my coworkers have, but I will not let this make me feel inadequate. I will still endeavor to assist in developing good teamwork.
6. I plan to find out how I can best serve the activity for which I have volunteered, and to offer as much as I am sure I can give, but no more.
7. I realize that I must live up to my promise and, therefore, will be careful that my agreement is so simple and clear that it cannot be misunderstood.
8. I believe that my attitude toward volunteer work should be professional. I believe that I have an obligation to my work, to those who direct it, to my colleagues, to those for whom it is done and to the public.

Author Unknown

You may also want to include some literature or motivational material such as the following:

It Matters to This One

*As I walked along the seashore
This young boy greeted me.
He was tossing stranded starfish
Back to the deep blue sea/
I said, 'tell me why you bother,
Why you waster your time this way.
There's a million stranded starfish
Does it matter, anyway?"*

*And he said, "It matters to this one.
It deserves a chance to grow.
It matters to this one.
I can't save them all, I know.
But it matters to this one,
I'll return it to the sea.
It matters to this one,
And it matters to me."*

*I walked into the classroom.
The teacher greeted me.
She was helping Johnny study.
He was struggling, I could see.
I said, "Tell me why you bother,
Johnny's only one of millions,
Does it matter anyway?"*

*And she said, "It matters to this one.
He deserves a chance to grow.
It matters to this one,
I can't save them all I know.
But it matters to this one,
I'll help him be what he can be
It matters to this one
And it matters to me."*

Author Unknown

“It is one of the most beautiful compensations of this life, that no man can sincerely try to help another without helping himself.”

William Shakespeare

Volunteer Assessment

Assessment gives volunteers a chance to reflect on their accomplishments, analyze their performance strengths and weaknesses; and think about their level of satisfaction and commitment. A well-thought-out individual assessment tool is valuable both for the volunteer and the volunteer program. Quite often during self-evaluation, volunteers will offer ideas for program or project improvements. Taking the time to design an assessment tool will greatly benefit your organization's volunteer program. Use the example form on the next page as a starting point and adapt it to your volunteer program needs.

Some volunteer administrators may want to use the assessment tool as a segment of a periodic interview with the volunteer. Before the interview, take a minute to look over the guidelines for giving feedback to functional pairs in chapter seven. Most volunteers really want feedback and also want to give administrators feedback on different aspects of their role and the programs with which they have been involved. Remember, evaluation is designed to help people feel good about the projects/tasks they complete, and encourages continued positive performance.

Volunteer Assessment Form

<p>Name: _____</p> <p>Assignment/Position: _____</p> <p>Staff liaison/contact: _____</p> <p>Responsibilities: _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>In completing these responsibilities, I rank my performance as:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Superior, exceeded my goals <input type="checkbox"/> Excellent job, met my goals <input type="checkbox"/> Adequate <input type="checkbox"/> Less than adequate, could use some additional training/assistance. <p>What aspects of this assignment did you enjoy the most?</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>What improvements to the assignment/position would I make if I did it again? _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>What additional support from my liaison/contact person would have been helpful? _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Would I want to continue in this position or with this project in the future?</p> <ul style="list-style-type: none"> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Would like to discuss further <p>Is there another position or other projects you are interested in? Please list:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>In general, what suggestions do you have for improving services to volunteers?</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Additional comments about your experience:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Interview date: _____</p> <p>With whom: _____</p>
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